

Orange Unified School District

School Board Update #1

Facilities Assessment & Funding Project

November 5, 2015

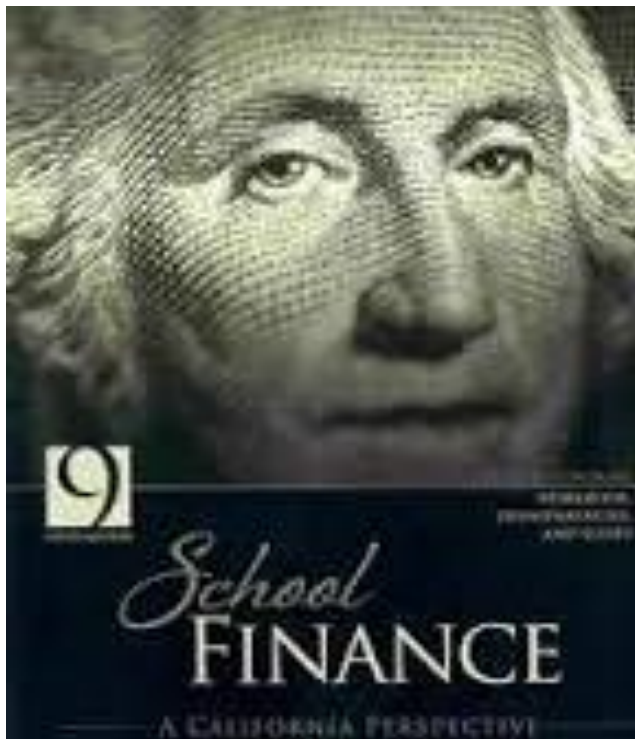
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Tonight's Meeting Objectives

1. Overview
2. Project Timeline
3. Fall Listening Tour Results
4. Immediate/Short-Term Recommendations
5. Board Q&A / Discussion

*This is an information item.
No Board action is requested.*

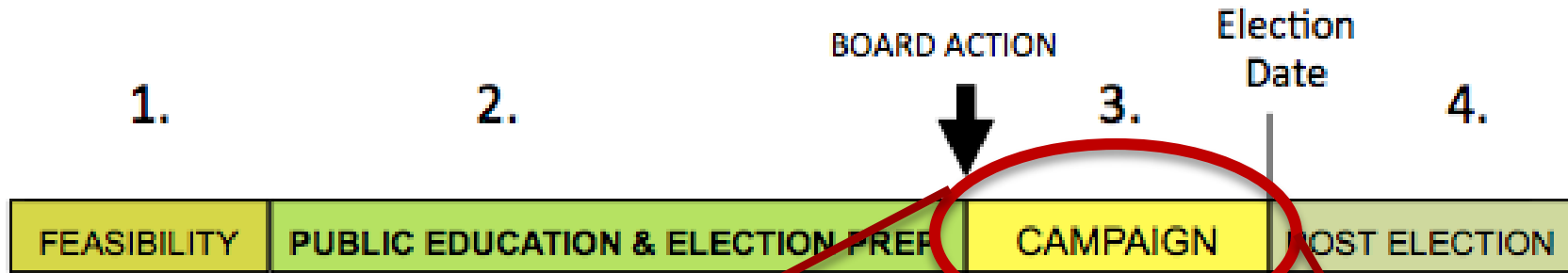
Overview



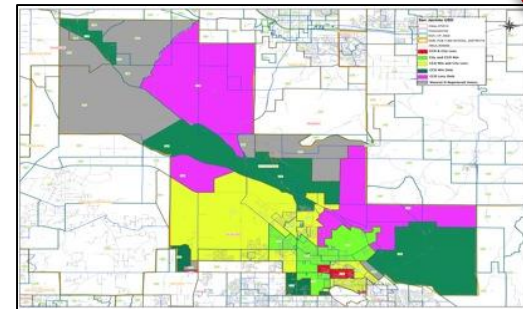
NAVIGATING IN THE PUBLIC ARENA IS:

- MORE Accessible and Widely Interpreted
(because information is abundant/instant).
- MORE Complex and Organic– at ALL Levels.
- MORE Demanding of School Leaders in Virtually Every Way.

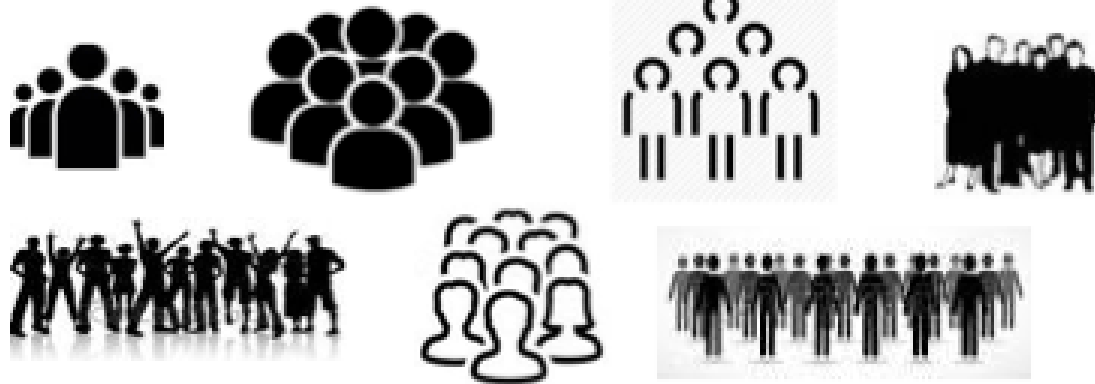
Overview: Reminder 1



This is a STRATEGIC project.



**People support
what they help create.**



TIME is Your most VALUABLE Resource.

We are here to
help you use it wisely.



Overview: Approach/Priorities

ORANGE USD SCHOOL BOND PLANNING TIMELINE (Nov 2016 Bond)

Assumption: A November 2016 Election. *State filing deadline for this election: Friday August 12, 2016.*

Fall 2015 **PHASE 1 Start-up. 3 Priorities: Due Diligence, Info to Board, & EARLY LISTENING.**

Aug – Nov.

1. District Due Diligence. Review/analysis – facilities + finance. Assess current need/conditions.
2. Info/Updates to Board – Monthly, starting in October with timeline overview.
3. Stakeholder Engagement - ROUND 1. FALL LISTENING TOUR - Concurrent activities:
 - Start-up: tools and list development, training & orientation, etc.
 - A. School Site Stakeholder Meetings – at EVERY Orange USD school site
 - B. Opinion Leader Work – “Strategic Conversations” across communities.

Nov 5, 2015 Report to Board – Fall (Early) Listening Findings – Presentation to Board.

Nov – Dec Conduct public opinion poll. Prepare/Conduct/analyze poll. Diagnostic/analytical work and communications planning.

By Dec 31 Feasibility determined for 2016 Bond.

Winter 2016 **PHASE 2 Crescendo – P1 Priorities Continue + Increasing Public Info & Preparation for Ballot**

Jan – March Stakeholder Engagement – ROUND 2. Monthly Board Updates. Engage. Listen. Learn. Shift to INFORMED communications push as District prepares for ballot.

- Continued Listening: opinion leaders, school/community stakeholders....+ now, voters.
- Ad Hoc Superintendent’s Bond Advisory Council
- February – Town Hall Meetings @ local high schools
- Engage Voters via Direct Mail – core message defined by NEED and research
- Activate District Speakers Bureau – service clubs, civic and school groups, etc.
- Launch local media program and EARLY e-communications (web, email, social media)
- Accelerate communications planning for the future

Spring 2016 **PHASE 3 Ready – P2 Priorities Continue + Increasing Public Info & Preparation for Ballot**

By Apr 1 DRAFT Bond Plan – READY. Board Review. Stakeholder Engagement – ROUND 3. Engage. Listen. Learn. Begin Citizen Oversight Committee Process.

By May 1 Core ballot measure package defined – informed by facility needs + opinion research + community input and consensus (as identified in community engagement work).

Summer 2016 Board Workshop to review full ballot measure “package” and ask questions. (We recommend an information only / no-action meeting for this workshop.)

June ... Board Action calling for the election. Final document preparation and filing.

By June 30 **Filing Deadline: 5pm.** If you haven’t filed by 5pm, you won’t be on the November ballot!

Aug 12 **Fall 2016** **PHASE 3 – CAMPAIGN For a November 2016 Election**

Aug – Nov 8 The Advocacy Campaign WINDOW. Goal: mobilize the voter support you need to WIN! ABSENTEE Ballots MAIL. [ALERT! 54% of OUSD Nov voters are expected to vote by mail.]

Early Oct: Election Day!

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Rev. 110515F

Project TIMELINE



Overview: Approach/Priorities

Track 1

District Due Diligence

Facilities, Technology, Finance, etc...

Track 2

Board Briefings, Education & Updates

Process, Facilities, Finance, Research, Consensus, etc...

Track 3

Stakeholder & Opinion Leader Engagement

"People Support What They Help Create."



Planning Approach/Priorities

Track 1

District Due Diligence

Facilities, Technology, Finance, etc...

- To Date: Hired Election Consultant, Pollster, Bond Counsel, Fiscal Advisor & SFID Consultant
- November: Interview Construction Managers (CMs)
- December: Hire CMs & Architects
- January: Form Superintendent's Advisory Council
- Feb & Mar: Community Meetings on HS Safety, Facility & Technology Needs
- Spring: Begin Citizen Oversight Committee Process
- April: Bond Plan Review - Board
- May: Community Consensus
- June-Aug 12th : Board Package Review, Action and Filing for the Election

Planning Approach/Priorities

Board Briefings, Education & Updates

Track 2

Process, Facilities, Finance, Research, Consensus, etc...

- November: Listening Tour Findings & Timeline Overview
- December: Finance Update
- January: Poll / 2016 Feasibility Update
- February: Spring Communications Updates
- March: Facilities 1 - Issues
- April: Facilities 2 - Bond Plan Review
- Spring: Briefing - Citizen Oversight Committee Process
- May: Listening Work Culminates in Reaching Community Consensus
- June – Aug 12th: Board Package Review, Action & Filing

Track 3

Stakeholder & Opinion Leader Engagement

“People Support What They Help Create.”

**FALL 2015: 3 PRIORITIES to Help Determine
Electoral Feasibility for Nov 2016.**

- 1. Stakeholder Meetings**
- 2. Opinion Leader Work**
- 3. Voter Opinion Research (Poll)**

(Poll Results Due in January 2016)

Stakeholder Engagement

“People Support What They Help Create.”

Assess and
Step 1. Listen.

1.



2.

BOARD ACTION



3.

Election
Date

4.



3-4 months

3-8 months

88 days to Election

Process - What LISTENING Looks Like

People support what they help create.



Orange Unified School District
2015-16 School Bond Feasibility Project

Listening Tour

Stakeholder Meetings & Opinion Leader Interviews

Facilitator's Guide

Goals:

- To provide information and raise awareness about school facilities NEEDS and District planning efforts.
- To seek and obtain feedback from community stakeholders, including views on school FACILITY NEEDS, INFORMATION NEEDS of various community groups, and the LEVEL OF SUPPORT for a potential new school bond proposal.

Attendance:

2-3 Stakeholder Meetings - 1) Teachers, 2) Parents, (+ for HS only, please include Students). Optimal = 10-20 stakeholders, including some OUSD voters.

3 One-on-One Opinion Leader Interviews - with individuals who are "Influencers" in your local neighborhood - whether or not they have a title.

Action Steps:

#	Action Step	By When
1.	MONITOR District planning efforts.	On-going
2.	SCHEDULE your Stakeholder	

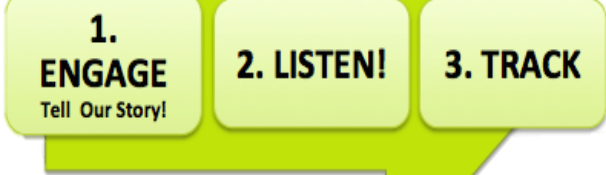
SWOT ANALYSIS:
Strengths, Weaknesses, Opportunities & Threats

STRENGTHS	WEAKNESSES

WHO NEEDS ATTENTION?

YOUR Unique Stakeholder Community

- Orange USD SCHOOLS**
- Orange HS** (PTSA, Orange HS Sports, Parents and Teachers United, Alumni, Feeder Schools: Lamson, Fairman, California, Cambridge, Fortna MS, Sycamore, West Orange, Hendly, Palmyra, Toros MS)
- El Modena HS** (PTSA, El Modena High School Collaborative Tech Program, El Modena Sports, Parents, Alumni Feeder Schools: Chapman Hills, Linda Vista, Esplanade, Santiago Charter MS, Palomares, Jordan, Prospect, La Vista)
- Hotspot: Villa Park** (City Rep., Women's League, Friends of the VP Library, Villa Park Community Services Foundation, League Club)
- Elected Officials / Public Agencies** (Elected: voter boards, City of Orange, Porter Assoc.)
- Education Cmty.** (Private schools: St John's, St Paul's, Salem Lutheran, Catholic & etc., Quakerie, OUSD teachers, Chapman University, Santiago Canyon College, education leaders)
- Political Parties** (GOP clubs, Dem. clubs, Orange Republican Women Federation, Central Committee)
- Voters!** (Micro-Climate TBD as project unfolds)
- Business** (Realtors, law firms, chambers of commerce, real estate developers, St. Joseph, CHOC)
- Villa Park HS** (PTSD, Villa Park HS Sports, Parents, Alumni, Feeder Schools: Fletcher, Bob Canyon, Serrano, Olive, Taft, Villa Park, Cerro Villa MS)
- Non-Profits, Civic Leaders** (Rotary, Kiwanis, E.S.L. VFW, American Legion, Youth Sports, Lions, MOMS Club, Sovereign Grace Church, The Rock Church, Orange County First Assembly of God, Saddleback Church, Marmion Church, Rock Harbor, Calvary Chapel Costa Mesa, Tempio Calvary Assembly of God, Lakeside Christian Church)
- Faith Community** (Orange County Synagogue, Orange County Synagogue, Knott Avenue Christian Church)
- Labor** (OUEA, CSEA, IBEW, OC Labor Federation + others TBD)
- Senior Citizens** (Age Well Senior Services, Anahiem Senior Citizens Club, Orange Senior Center, Southwest Senior Center, OC Seniors Golf Assoc.)
- Homeowners** (Orange County Homeowners Association (OCHA) + others TBD)
- Business** (Realtors, law firms, chambers of commerce, real estate developers, St. Joseph, CHOC)
- Canyon HS** (PTSA, Assoc., Student Body, Canyon Education Foundation, Canyon HS Sports, Parents, Alumni, Feeder Schools: El Rancho Charter MS, Anahiem Hills, Canyon Rim, Imperial, Crescent, Running Springs)



Active Listening → Community Alignment

Fall Listening Tour - Process

Stakeholder Meetings:

GOAL: Engage stakeholders (particularly parents and school staff) at **EVERY** school site and at the District Office.

WINDOW: Sept 15th – Oct 30th (Round 1)

DRIVERS: School Site Principals + District Leadership.

BENEFIT: Real conversations enroll stakeholders in thinking about OUSD facilities needs – and weighing in on why quality school facilities and education technology matter. (*People support what they help create.*)

REACH: **1,432+** *and continuing...*

STATUS: Round 1 complete. Future rounds planned in 2016.

Fall Listening Tour - Process

Opinion Leader Work:

GOAL: Engage “opinion leaders” (*people of INFLUENCE, whether or not they have a title*) who we can learn from – or who simply need attention – long before we’re on the ballot.

WINDOW: August 1 – present (Round 1)

DRIVERS: Superintendent Christensen, Principals & CliffordMoss.

BENEFIT: Real conversations invite opinion leaders to think about the impact of OUSD facilities NEEDS and why quality schools matter. This is an optimal setting for candid exchange. *People support what they help create.*

REACH: **56+** *and continuing...*

STATUS: *Listening/OL work continues.* Future rounds planned in 2016.

Fall Listening Tour - Process

OUSD Board of Trustees
City Council Members
Past Office Holders
District Administrators
OUSD Educators Association
CSEA Chapter #67
High School Principals
CARE Activists and Leaders
PTA/PTO Council Leaders
Past Bond Campaign Organizers
Measure K Opponents
Service Club/Foundation Leaders
School Bond Skeptics
Business Leaders
School Site Communities

MESSAGE:

“We are regrouping, reassessing.
Our needs have not gone away...
We are EXPLORING OPTIONS...
We want your honest input.
No decisions have been made.”

What do YOU think?”

*Our position/tone/attitude:
Interested. Actively Listening.*

NEXT....

Board Briefings, Education & Updates

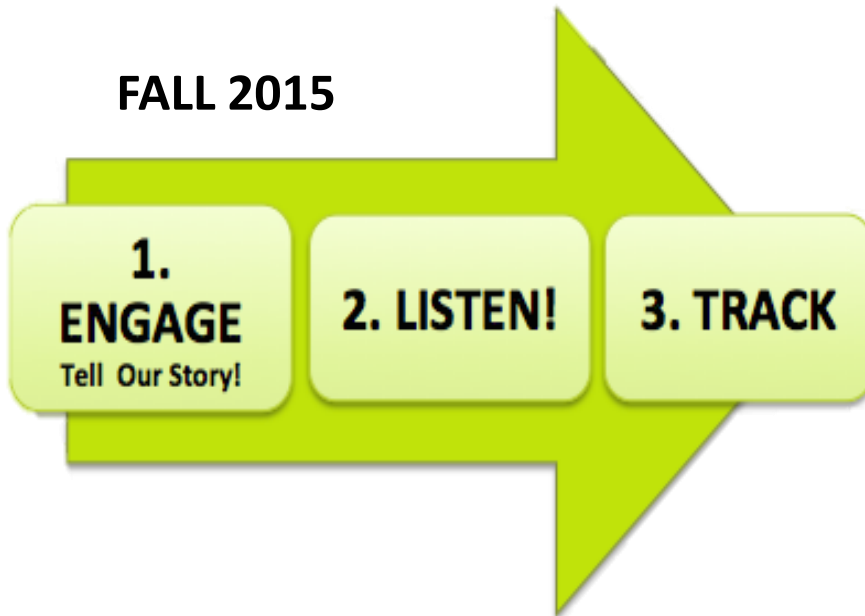
Process, Facilities, Finance, Research, Consensus, etc...

TONIGHT:

- **November:** **Fall Listening Tour Findings**
- December: Finance Update
- January: Poll / 2016 Feasibility Update
- February: Spring Communications Updates
- March: Facilities 1 - Issues
- April: Facilities 2 - Bond Plan Review
- Spring: Briefing - Citizen Oversight Committee Process
- May: Community Consensus
- June – Aug 12th: Board Package Review, Action & Filing

Fall Listening Tour – Summary

FALL 2015



FEEDBACK: TOP 5 THEMES

People support
what they help create.



1. There is wide recognition of NEED.

“Our school...”

- “...deserves to make a great first impression, not one that perpetuates the current inaccurate perception.”
- “...has been neglected so long that the critical facility needs list now includes the entire school – top to bottom and inside out. “
- “...is falling apart....”
- “***We need this bond.*** This is how people improve their local schools in California. This is why neighboring districts’ schools look so much better than ours.”



2. There is Broad Community Support for the “High Schools FIRST” approach.

- “High schools need so much more work...each one is like a small city”
- “Younger kids eventually go to the high schools...”
- “Elementary schools could use the money too.”
- “What if the money was divided according to school enrollment?”
- “If money is spread too thin, the impact will be limited.”
- “It’s about college and career-readiness...”



3. Opinions about WHY Measure K lost, are abundant.

- “Started too late...not enough foot soldiers”
- “Not enough information”
- “We didn’t know...didn’t think it was for us...”
- “The biggest hurdle is getting voters to trust the Board...”
- “Apathy...Confusion...Low Awareness...Misinformation...”
- Base was too narrow – “...thought it was just a high school thing.”
- “Organized Opposition”
- “Villa Park”

***We can learn from Measure K.
And, Measure K...is history now.***



4. Lots of questions about how school bonds work + what a winnable OUSD proposal looks like.

- Overall bond amount (“You asked for too much/too little”)
- Tax rate (“How much will it cost me?”)
- Project List (“What will the money be used for?”)
- Financial structuring (“We’re conservative here.”)
- “How do bonds work?”



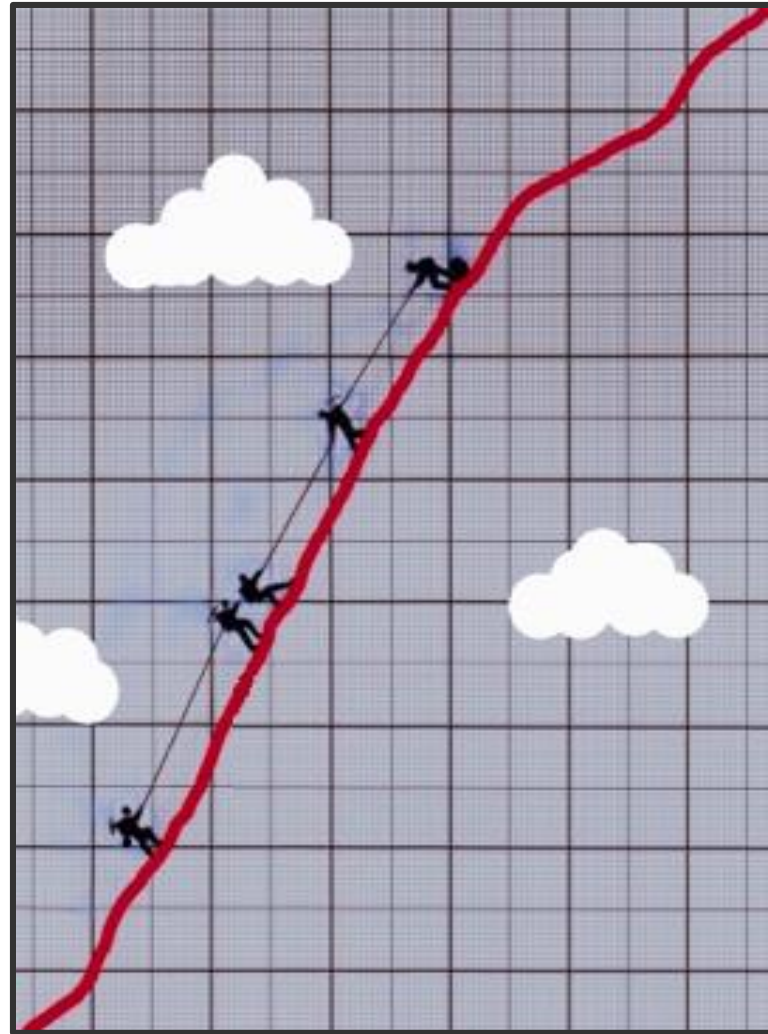
5. Communications Problems:

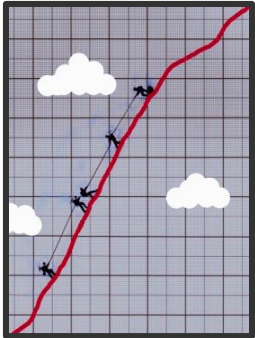
Limited Info. Distractions. Opposition. Apathy. Confusion. Diverse universe/needs.

- “We didn’t know...didn’t understand...”
- “There was a lot of incorrect info. People need the **facts.**”
- “I don’t’ get it. How do bonds work? Walk me through it.”
- “Can’t you make school finance easier to understand?”
- “How is the District a good steward of taxpayer funds NOW?”
- “People don’t think the money will be spent as promised.”
- “How is this going to make things better for ME?”



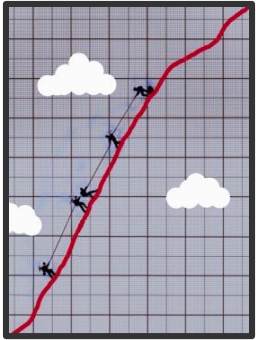
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Immediate / Short-Term
Recommendations





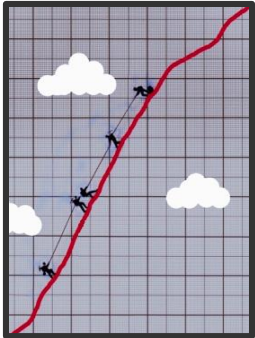
1. Tell OUSD's story more effectively.

- Embrace a Unified Message (informed by research). Then, Practice *Message Discipline*.
- Keep our OUSD story SIMPLE and FACTUAL.
- **RE New Bond:** Clarify how bond funding works. Engage stakeholders in building the Bond Plan. Share OUSD's Bond Plan broadly, prior to calling for a new bond election.
- As work continues on this issue, seek common ground. Improve the Orange USD **Board** story. Strive to **Earn** Community Trust.



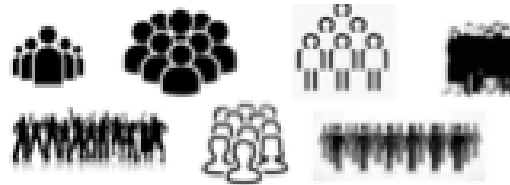
2. Expand and accelerate outbound information provided to stakeholders, voters and the public.

- Provide MORE public information.
- Keep it SIMPLE & FACTUAL. Include visuals.
- Customize communications when possible.
- **Be transparent.**
- **Be honest.**
- **Be inclusive.**
- **Be resourceful.**



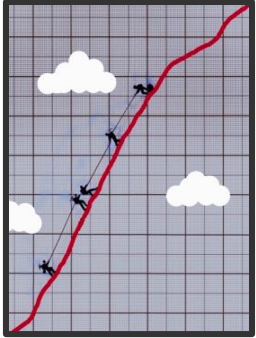
3. ENGAGE OUSD Stakeholders in a continuing 2-Way conversation.

**People support
what they help create.**



Our Proposed Timeline Includes:

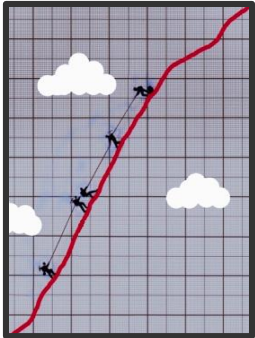
- More School Site Stakeholder Meeting “Check-ins”.
- Continuing Opinion Leader Conversations.
- Additional public meetings – at the District Office AND at Neighborhood Schools.
- Online 2-way Listening Activities – web, email, social media.
- Direct Mail, Featuring 2-way Listening Communications.



4. Commit to being DATA-DRIVEN. Let the data tell us where to go.

Data Point Examples:

- SFID Research
- OUSD and Bond Financials
- Voter Opinion Research



5. Be STRATEGIC.

- Focus. Use time wisely.
- Be practical. *Stay nimble.*
- Support Staff keeping the process on track.
- Continue LISTENING.
- Manage expectations - in all directions.
- As a Board, **work together.**
Future Bond Success may depend on it.
 - Look for common ground.
 - Own the job of *Earning* Community Trust.
- **Prepare for a Consensus Solution.**

Approach/Priorities

Track 1

District Due Diligence

Facilities, Technology, Finance, etc...

Track 2

Board Briefings, Education & Updates

Process, Facilities, Finance, Research, Consensus, etc...

Track 3

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Wrap Up

Timeline Review

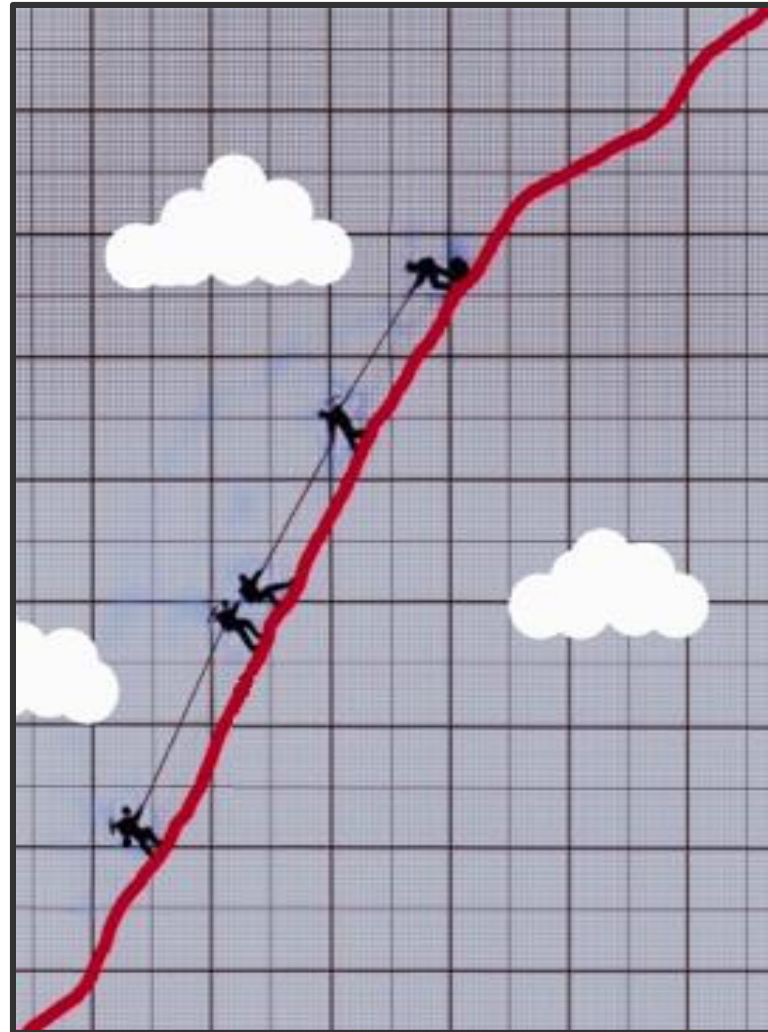
Board Q&A Discussion

Next...

Dec: Finance Update

Jan: Poll Results
Feasibility Update

Ongoing: Monthly Board Updates



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CliffordMoss.